

## FINANCIAL DOCUMENTS

Use the following list as a guide to help determine the financial status of your loved one. The financial document inventory is one of the most important when planning ahead. Don't wait until there is a crisis.

In a planning ahead, you may want to think about future access to these accounts by power of attorney or becoming a joint tenant.

Indicate the applicable items and list the account numbers and contact.

[illegible]

**FINANCIAL DOCUMENTS (continued)**[illegible]